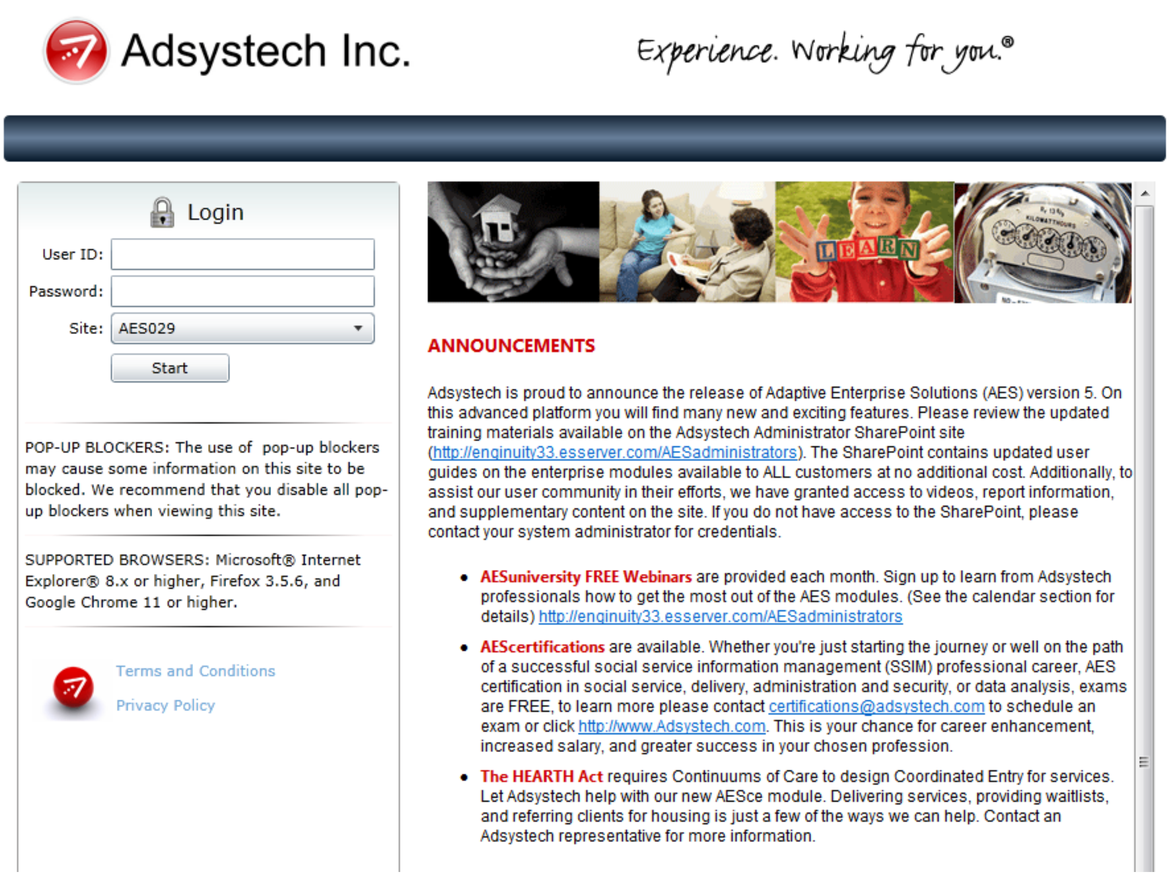
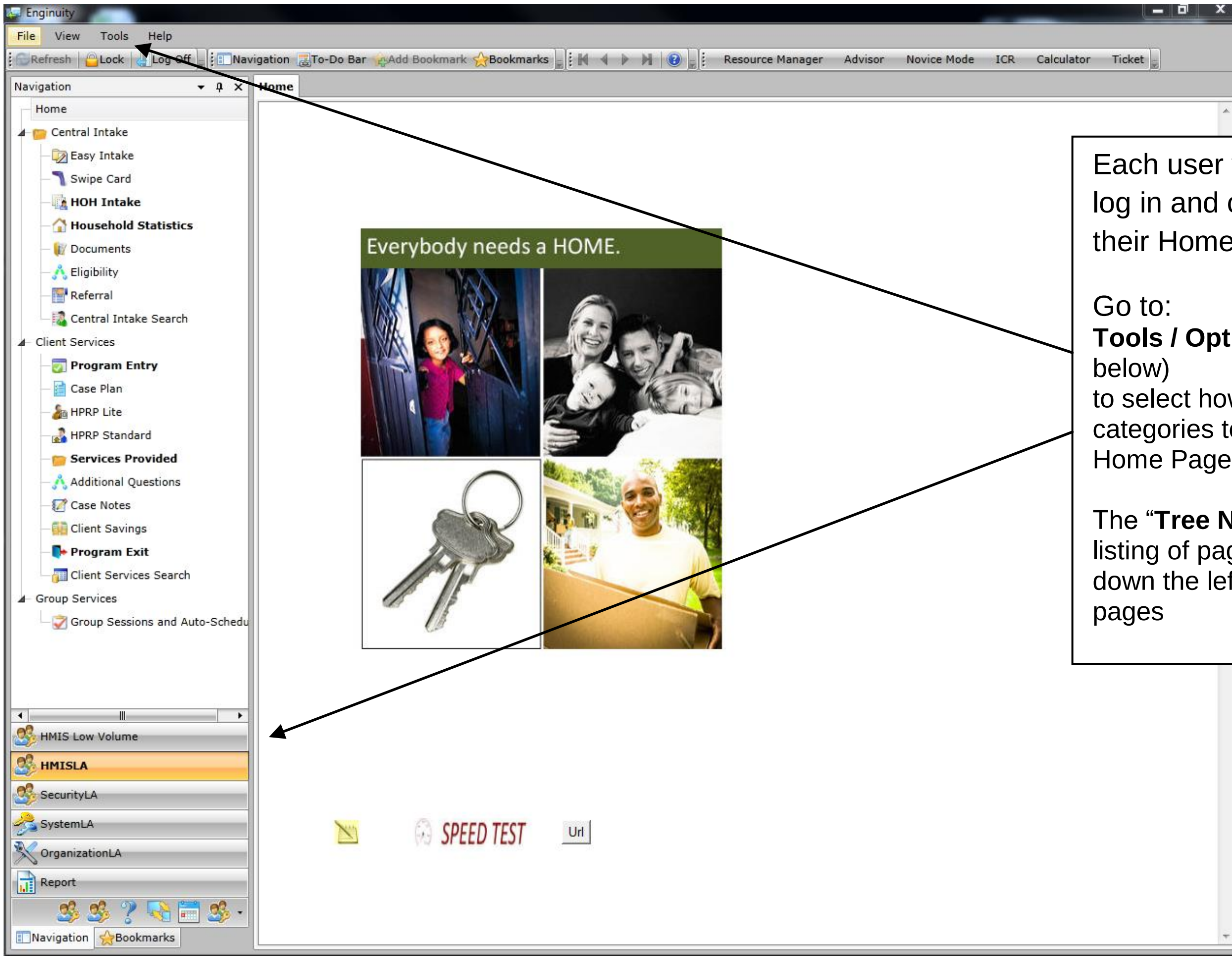
New Icon

Old Icon

Log In Page



New Home Page



Each user will be able to log in and customize their Home Page.

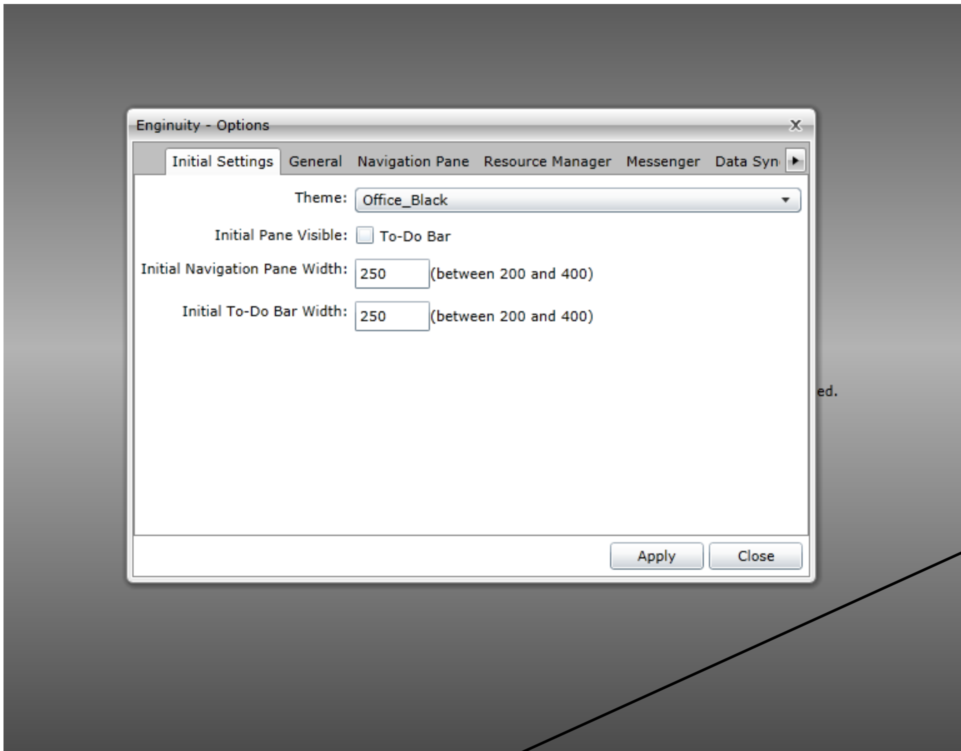
Go to:
Tools / Options (see below)
to select how many categories to pin to the Home Page Tree Node

The "**Tree Node**" is the listing of page options down the left side of all pages

Note the categories have been changed from example above:

1) 6 categories changed to 8
2) Order of categories changed

Home Page Customization

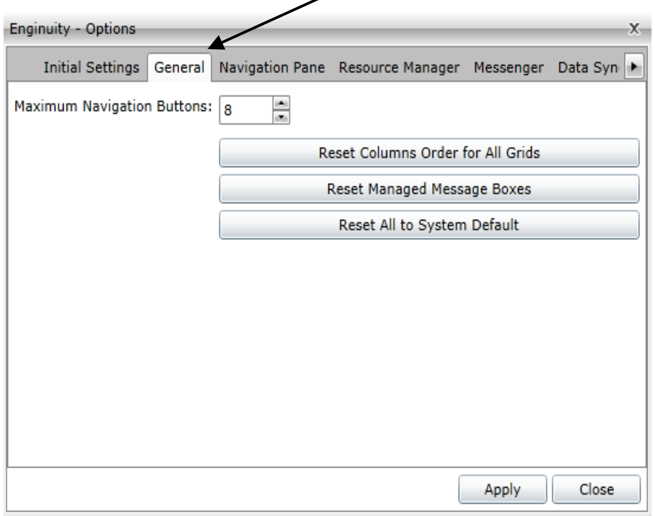


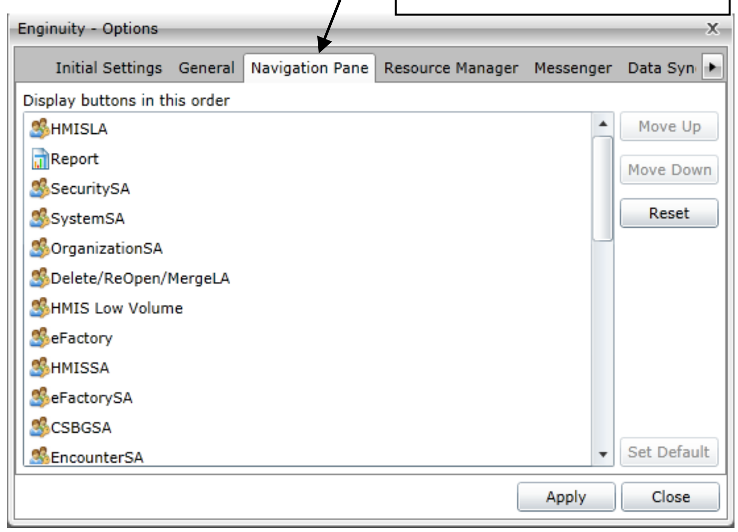
Go to:
Tools / Options / General

to select how many categories to pin to the Home Page tree

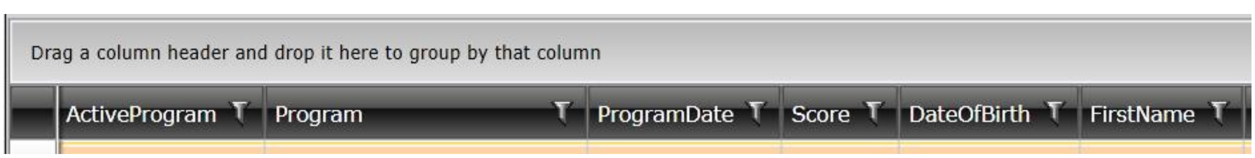
Tools / Options / Navigation Pane

to order the categories using the ‘Move Up’ and ‘Move Down’ buttons





Customizing Grids



All grids may be customized by moving the desired category to the place you choose. You then right click in the grid and choose “Save columns order”

Data Organization in HMIS

1) **Central Intake = Demographic Records** *** One record per client**

   a) Demographic Data
   b) Income and Non-Cash Benefits

2) **Client Services = Programmatic Records** *** as many records as required**

   a) Program Entry
   b) Residence prior to entry
   c) Entry/Exit Questions (required questions are shaded in **PURPLE**)
   d) Services Provided
   e) Program Exit

3) **Snapshots** *** see Snapshot inserts**

   a) Taken automatically at program entry –and- exit

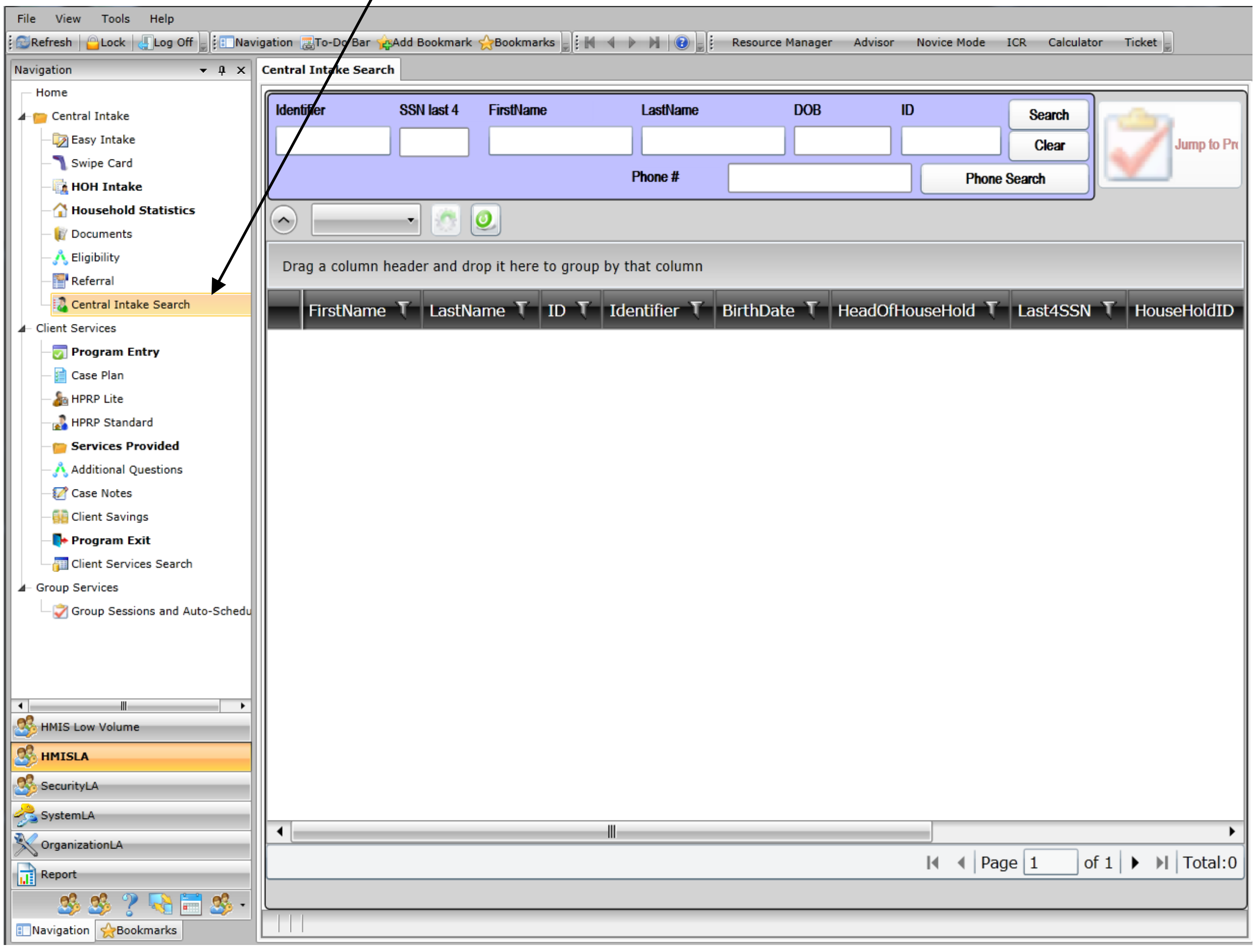
4) **3 Rules of Thumb**

   a) **Enter all HH members into Central Intake and assure that all data are correct (especially income and non-cash benefits) before *entering and exiting* Household members from program**

   b) **Enroll all Household members into program at same time – ALSO - Exit all Household members from program at the same time**

   c) **Answer program entry/exit questions for EACH Household member**

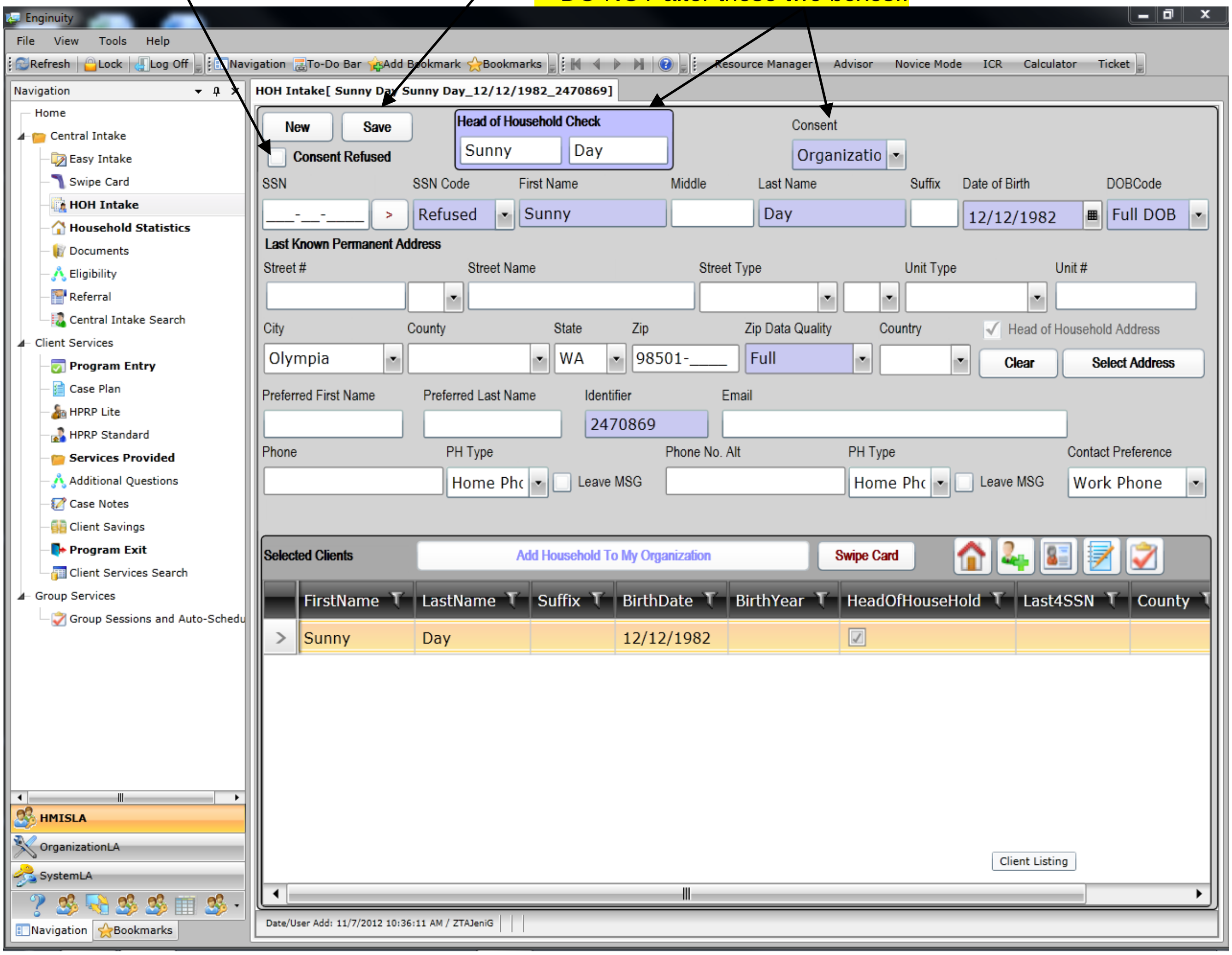
Before initial client entry – go to **Client Intake Search** to insure client is not already in system



Initial Central Intake page for **Head of Household** only – fill in all PURPLE shaded areas unless the client is a DV victim or has Refused Consent (see below)   - Completion of white areas will increase data quality

-Save-

** DO NOT alter these two boxes!!



The **Consent Refused** checkbox is for clients who refuse to sign a consent form or in cases such as domestic violence, sexual assault, dating violence, or stalking. Washington State law (**RCW 43.185C.180**) requires that service providers obtain written consent from homeless clients in order to enter personal identifiers (First and Last Name, Social Security number, full DOB, initials, last known permanent address or Zip Code) into HMIS.

<u>Client Rights</u>

1) Clients have the right to refuse to provide personal information, or to stop an agency from entering their personal information into the HMIS.

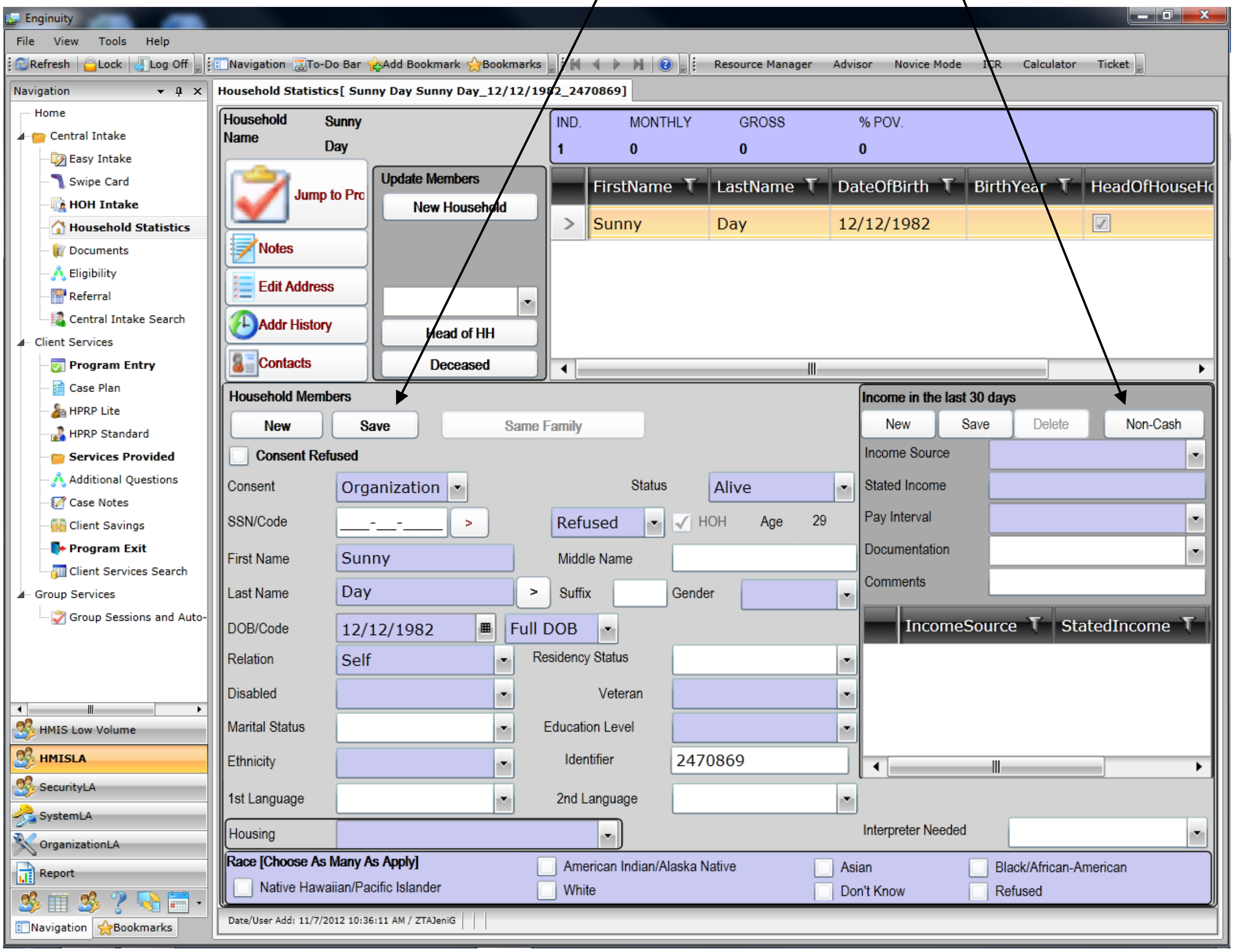
2) Clients have the right to decide what personal information can be shared about the client and their household in HMIS, and who it can be shared with.

3) Clients have the right to change their mind about what personal information the agency has in the HMIS, what types of information they can share and who they can share it with. The agency must be notified in writing if a client changes their mind about consent settings. See the **Client Revocation of Consent** form.

Household Statistics –

1) Fill in all PURPLE shaded areas for HoH first **-Save-**
2) Add Income and Non-Cash Benefits

***** If there are no Income Sources put **“No Financial Resources”** **-Save-** - if no Non-Cash Benefits click the **“No”** box



Income Sources –

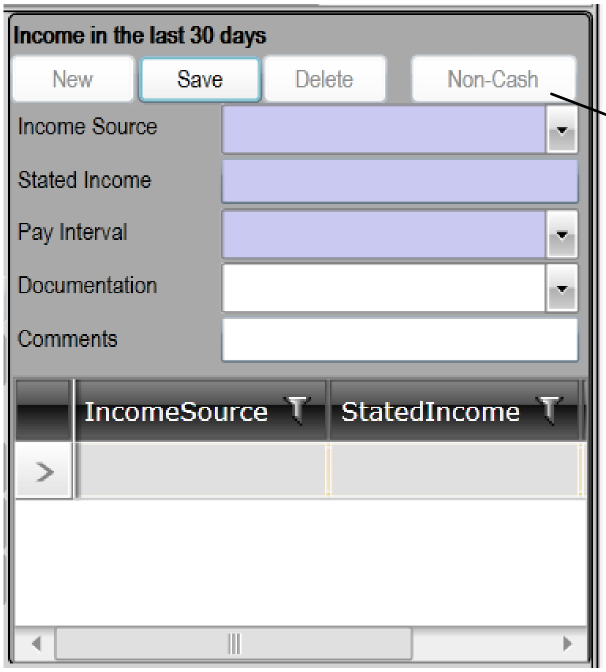
It is possible that a client has multiple sources of income – or – even multiple sources of the same type of income. List as many income sources as necessary.

If a client has more than one source of the same income type (i.e. two part-time jobs as Earned Income) you will need to add the two sources together and enter the total. The pay interval would be the most common denominator.

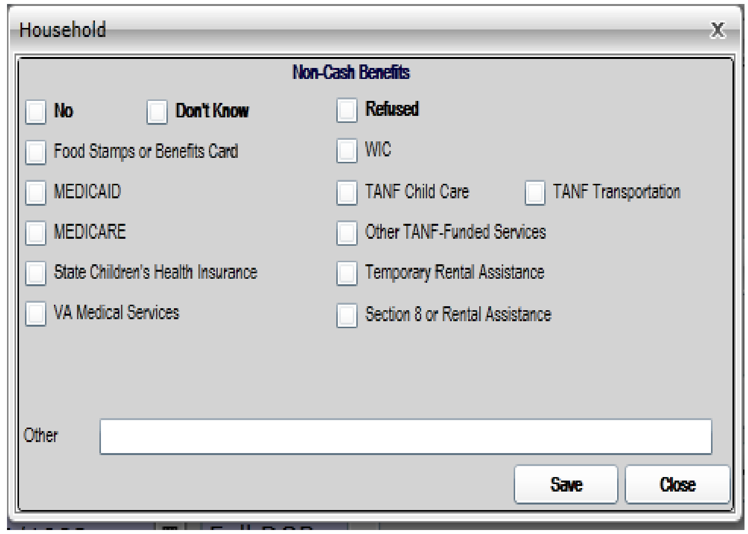
Income & Non-Cash Benefits

1) **Note income –** can be from as many sources as necessary - **Save**

2) **Note Non-Cash Benefits** – a non-cash benefit that affects all family members should be given to ALL family members. A benefit such as “State Children’s Health Ins” should be given only to the child it benefits - **Save**



Pop up Box – Non-Cash Benefits



Notes:

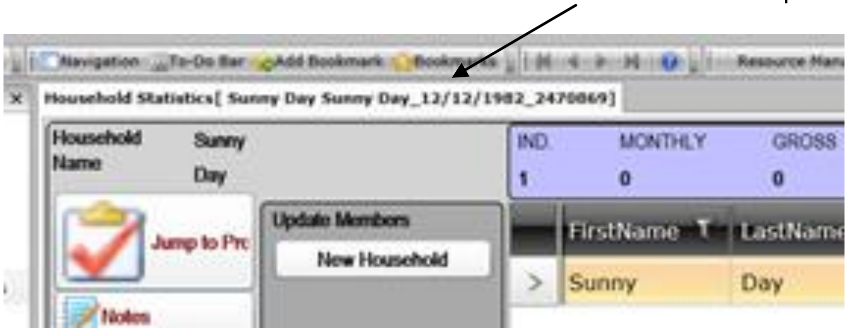
There are different sections on the Household Statistics page that are not well defined.
Please note that the section for **Household Members** is in a light gray shaded area (grid on bottom left) with the **Race** section just below it in a **Purple** shaded area.

–AND-

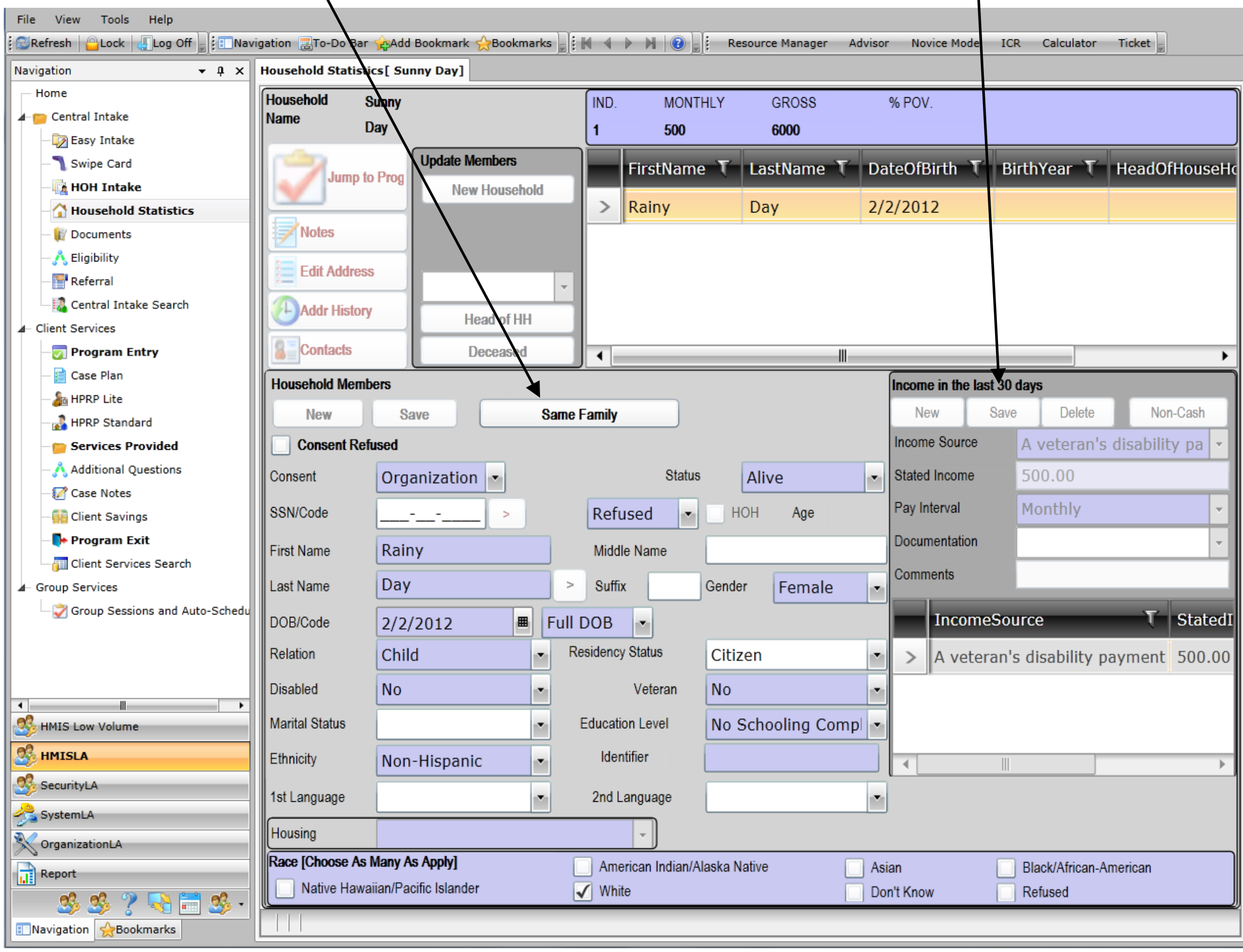
The **Income in the Last 30 Days** section is in a dark gray shaded area (grid on bottom right)

The total **Household income** is at the top of the Household Statistics page in a Dark purple shaded area.

The current –or- Active Client will be in the white tab area at the top of all working pages.



Additional Household members –
1) Click on “New” and repeat input of information into **PURPLE** boxes for **each** HH member
2) Click on “**Same Family**” to save **each** HH member before moving to the next HH member
3) Do not forget the Income & Non-Cash Benefits for **each** HH member - **Save in each grid**



Notes:

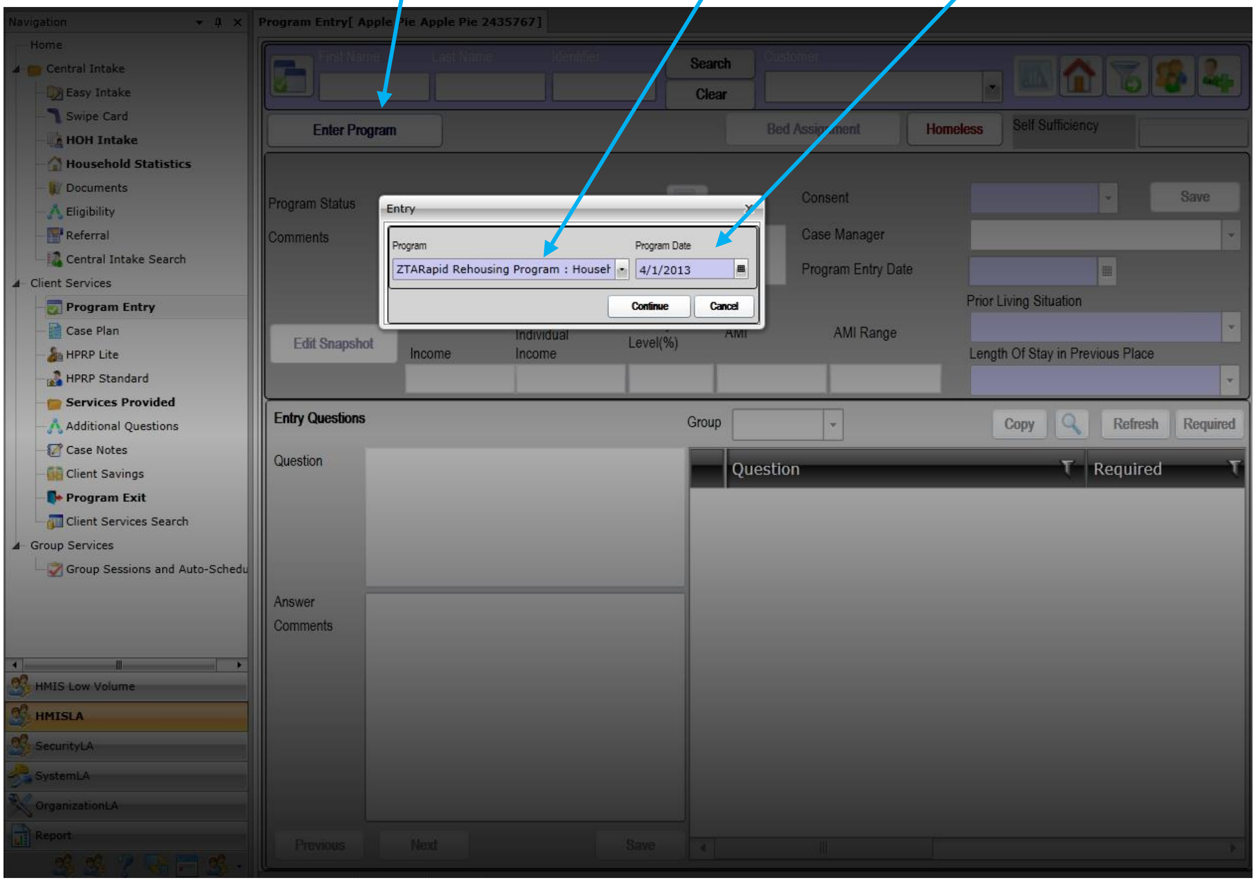
Verify current –or- Active Client in the White Tab of all pages

You can verify combined HH income information in the **Purple ribbon** at the top of the page and total household members in the **orange** highlighted grid just below it.

**** When all Household Statistics are completed for ALL members of a household**

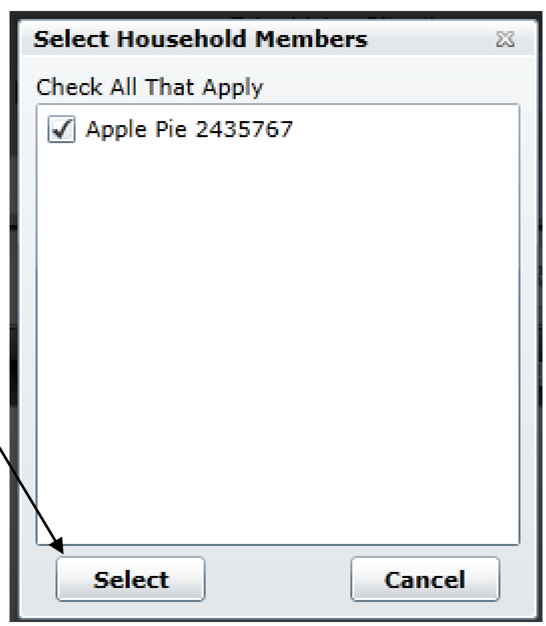
-OR- you can now go directly to Program Entry by clicking on the **Tree Node** at the left side of the page

Program Entry – 1) Click on “Enter Program” -2) Select Program from drop down box - 3) Input Program Entry Date - 4) Click on **Continue**

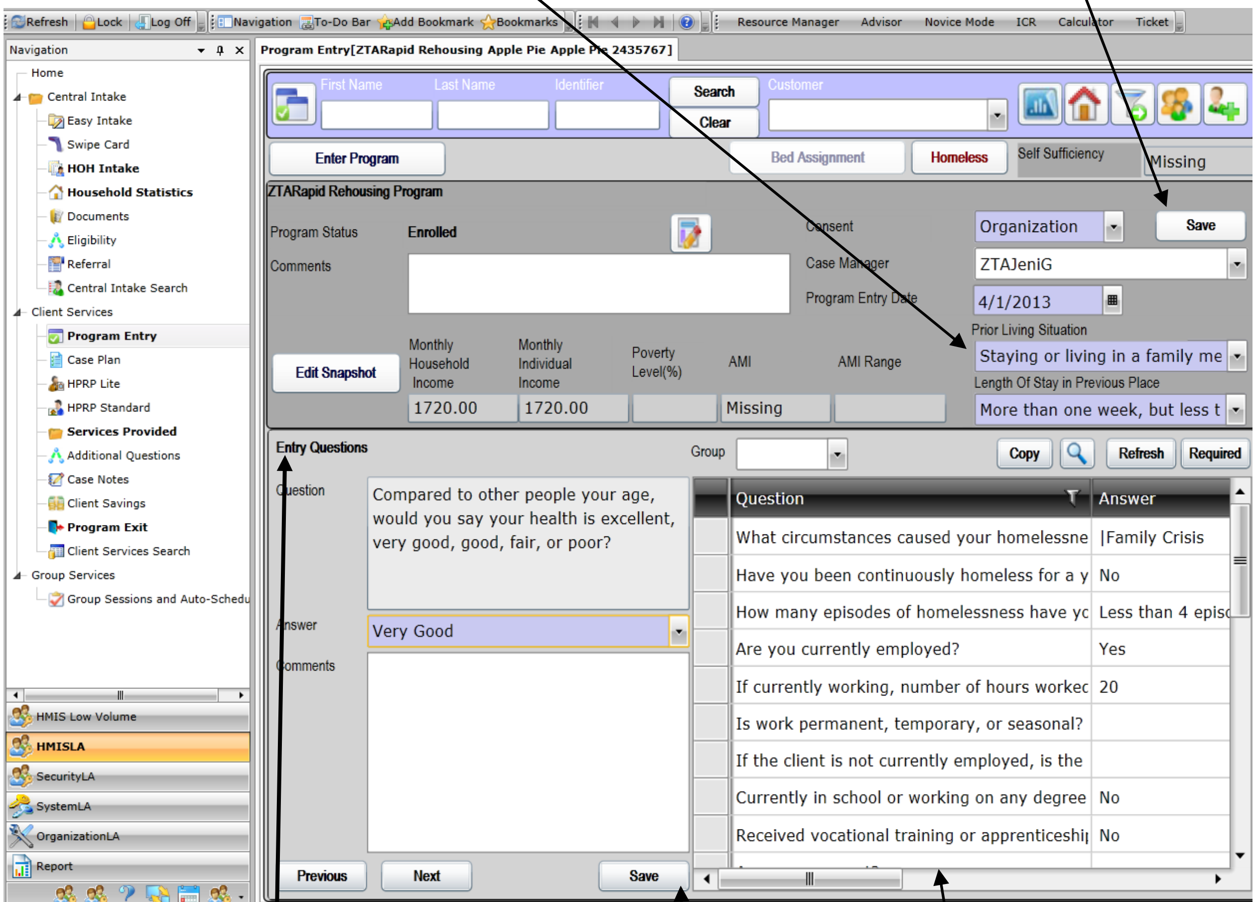


-5) Select (√) all HH Members to be enrolled

- 6) Click **Select**



Answer: 1) Residence Prior to Program Entry 2) Length of Stay in Previous Place - 3) **Save**



4) Answer Entry Questions for **ALL** HH members.
Even Children. Move through questions by clicking Next –or- Previous

*all required Entry Questions have **PURPLE Shaded ANSWER Boxes**

5) **Save**

** Summary of all questions and answers will show in Entry Questions List

Services Provided –

1) Click **New**

2) Click Activity drop down box and select a service

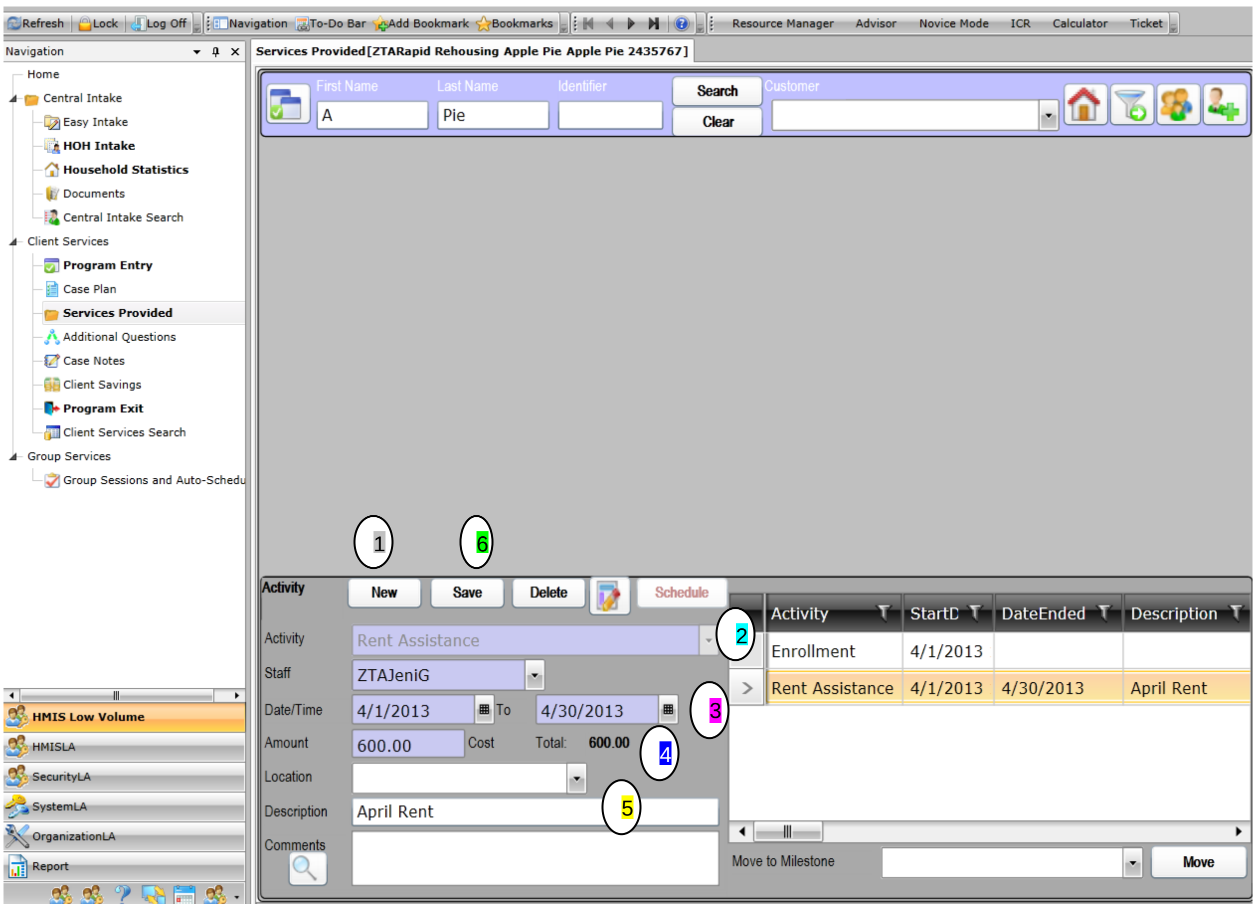
3) Input dates of service – for past due input the same date for both fields

4) Input amount paid

5) Input any notation for "paid to" or "explanation of payment"

6) **Save**

** All HH members must have at least one service (can be an enrollment)



For activities such as:

Rent Assistance – you will need to input a start and end date: 04/01/2013 to 04/30/2013

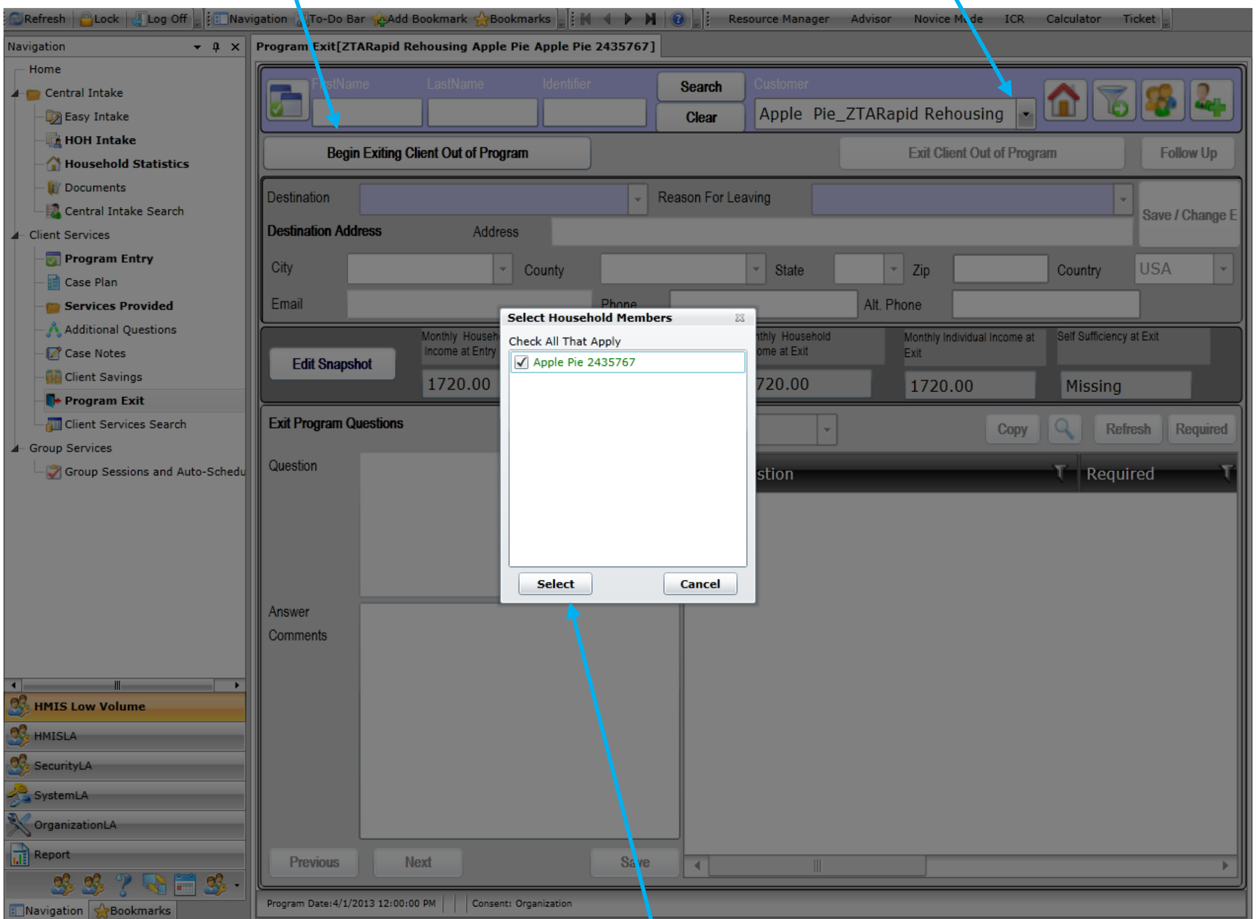
Rent in Arrears – you will input only the date you are attributing the service: 04/01/2013 to 04/01/2013

Program Exit –

**** Update Income and Non-Cash Benefits for Household in HH Statistics before beginning Exit**

1) Select the HoH - confirm the program being exited (dropdown box will have all programs enrolled)

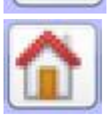
2) Click on **'Begin Exiting Client Out of Program'**



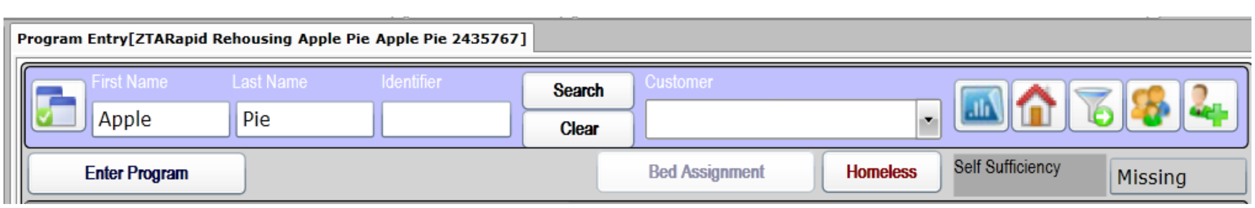
3) (√) all Household Members exiting program – click **Select**

Icons

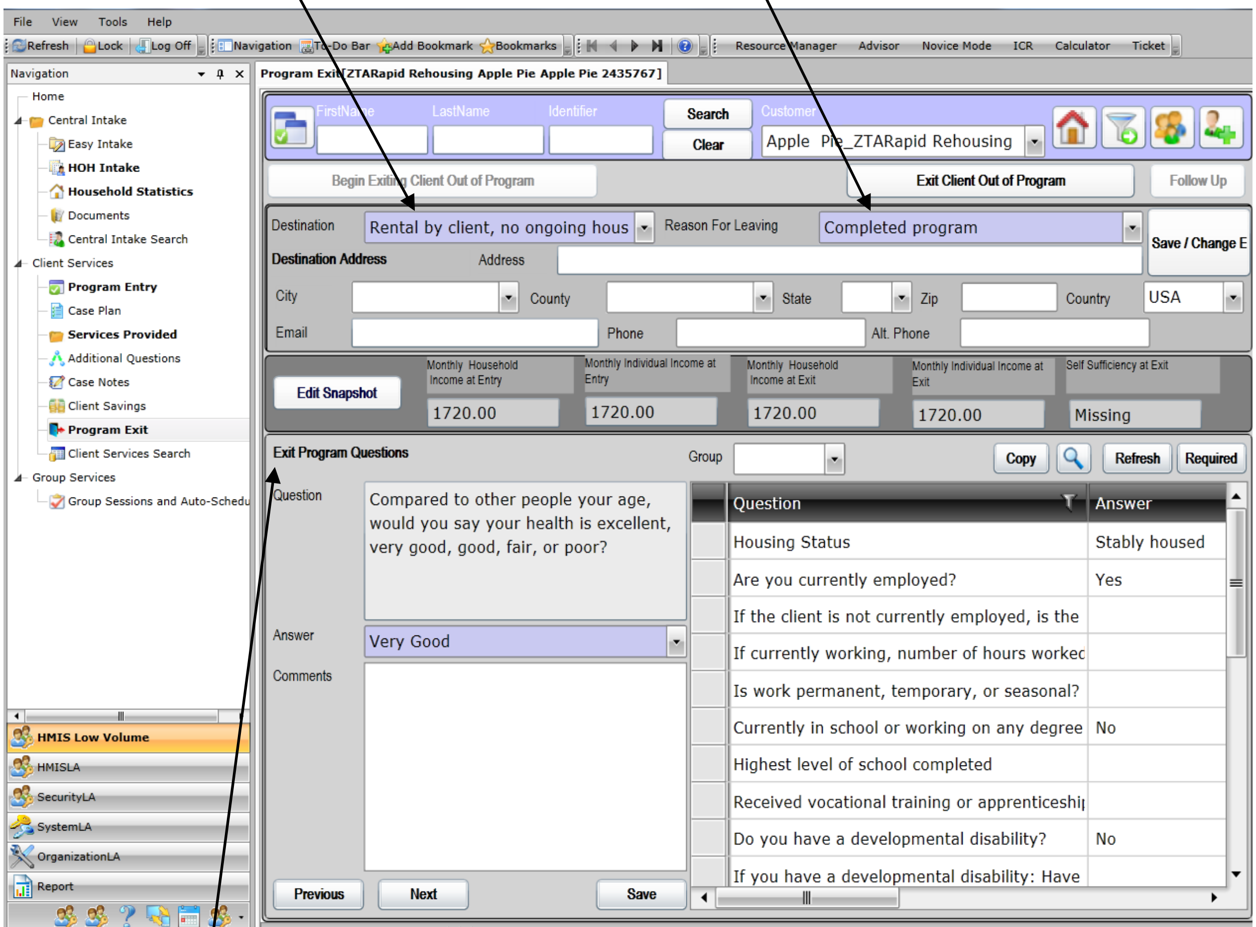
Preview Entry Report



Shrink List To Current Household



Answer: 1) Destination 2) Reason For Leaving

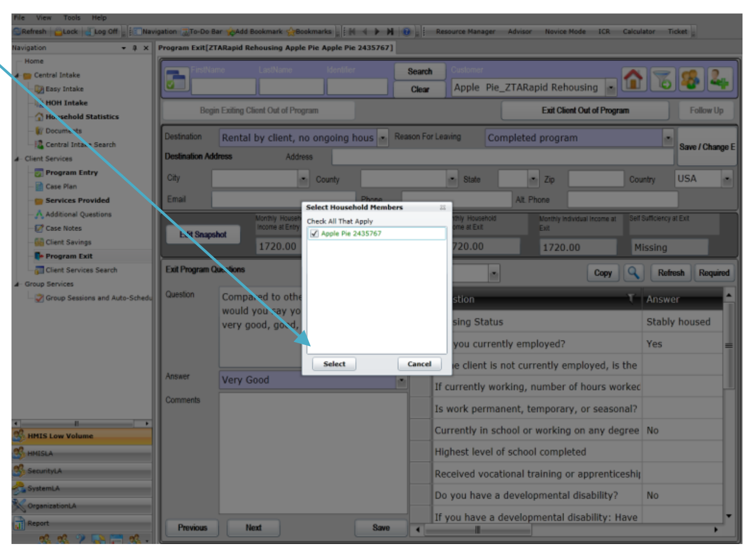


3) Answer all Exit Questions – required questions have **Purple shaded Answer boxes**. A summary of Exit Questions with answers will appear in the box next to questions. **Answer questions for **ALL** Household members - **Copy** can be used if answers are the same as in Entry Questions. You will need to answer the Housing Status question **after** the copy.

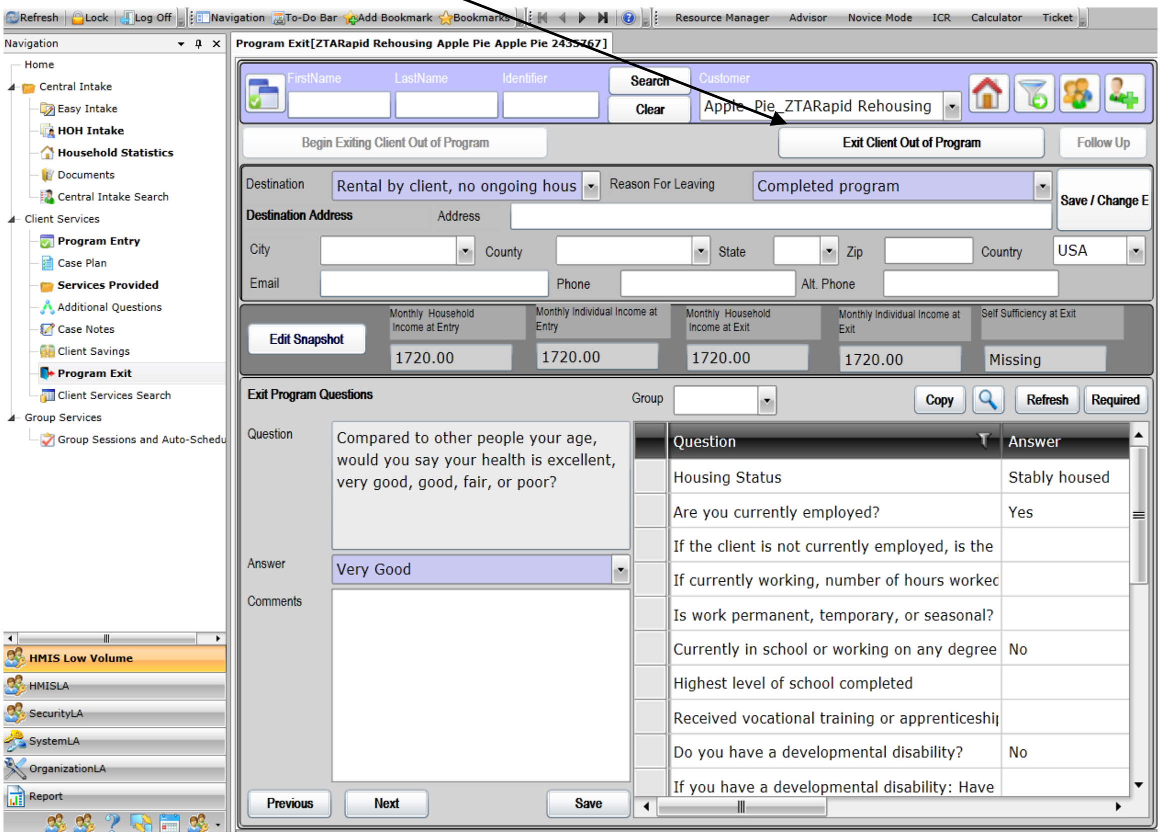
4) **Save** - the system will let you know if you have missed a question. You can review all answers in the summary box.

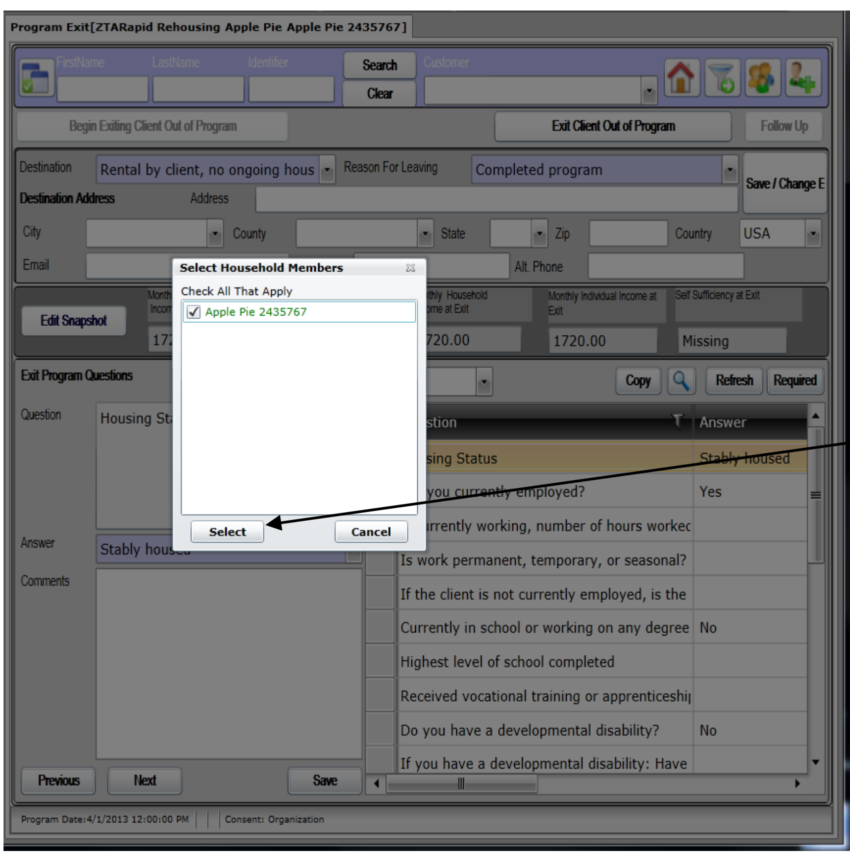
5) Click on **Save -** at the top right of the page

6) (√) Household members to exit - click **Select**



7) Click on ‘**Exit Client Out of Program**’

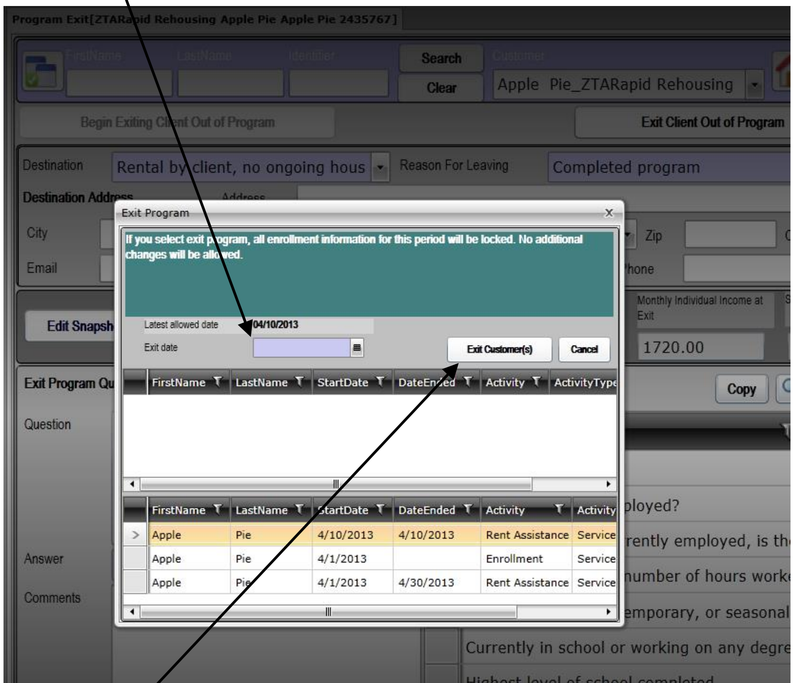




Make sure all exiting HH members are checked (√) and click on

- Select

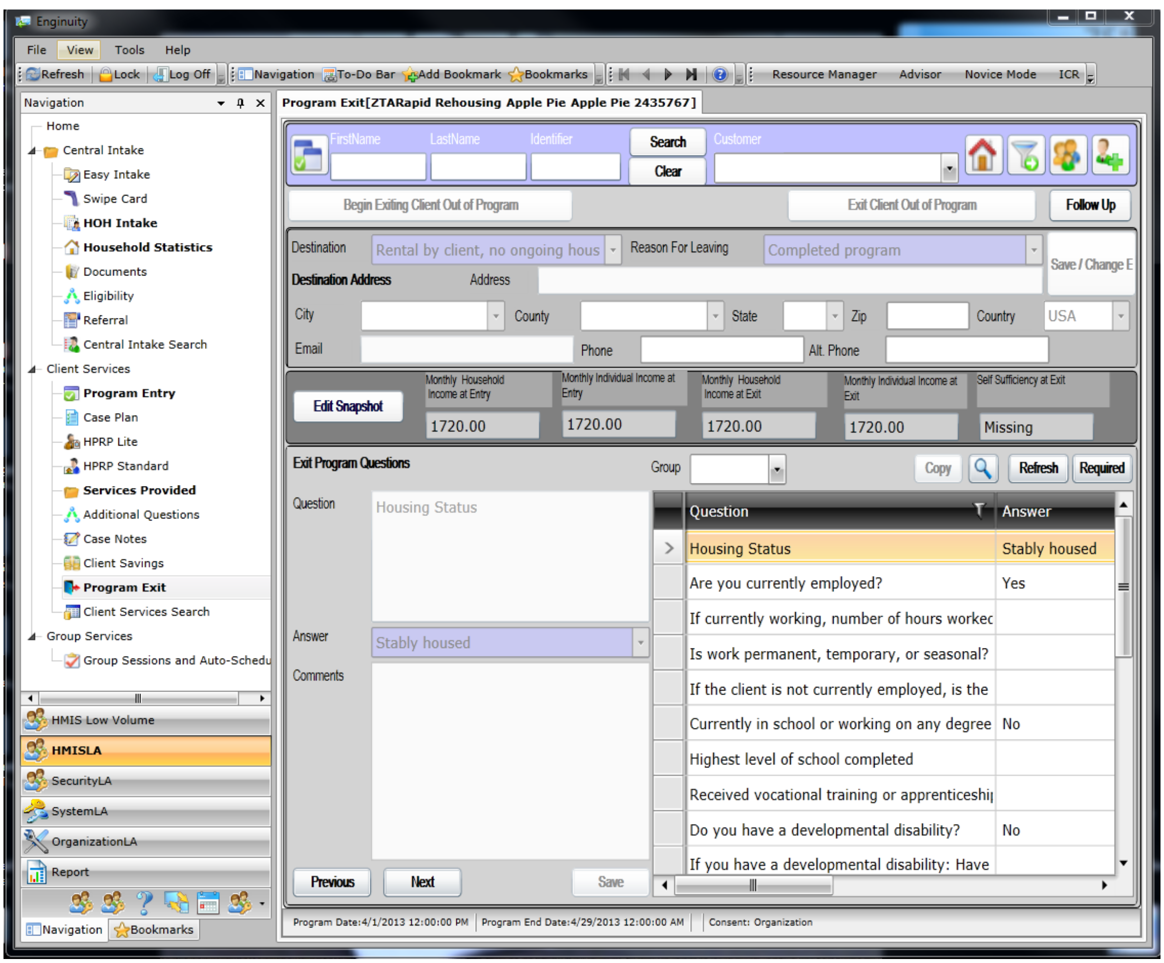
8) Enter date of Program Exit



The system will notify you if there are any outstanding services beyond the exit date. You can choose to cancel the exit and go back to identify services –or- choose to Exit Clients which will delete the outstanding services.

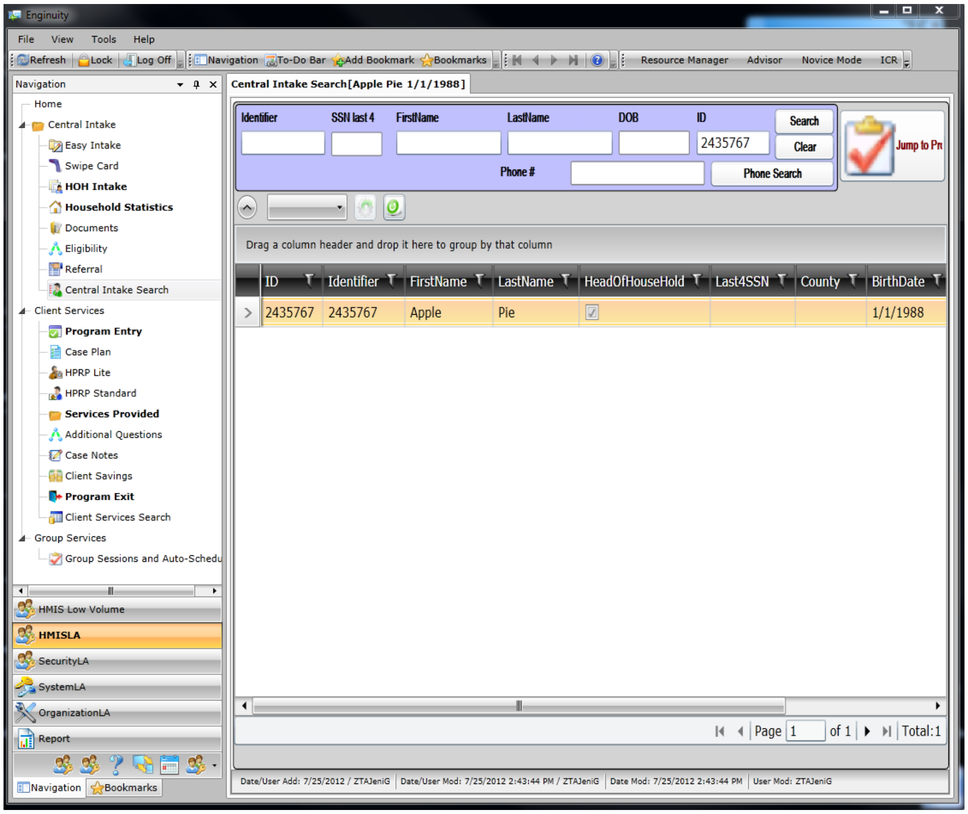
9) **Exit Client(s)**

10) Program Exit screen will “Gray Out” and no new information for that program enrollment can be entered

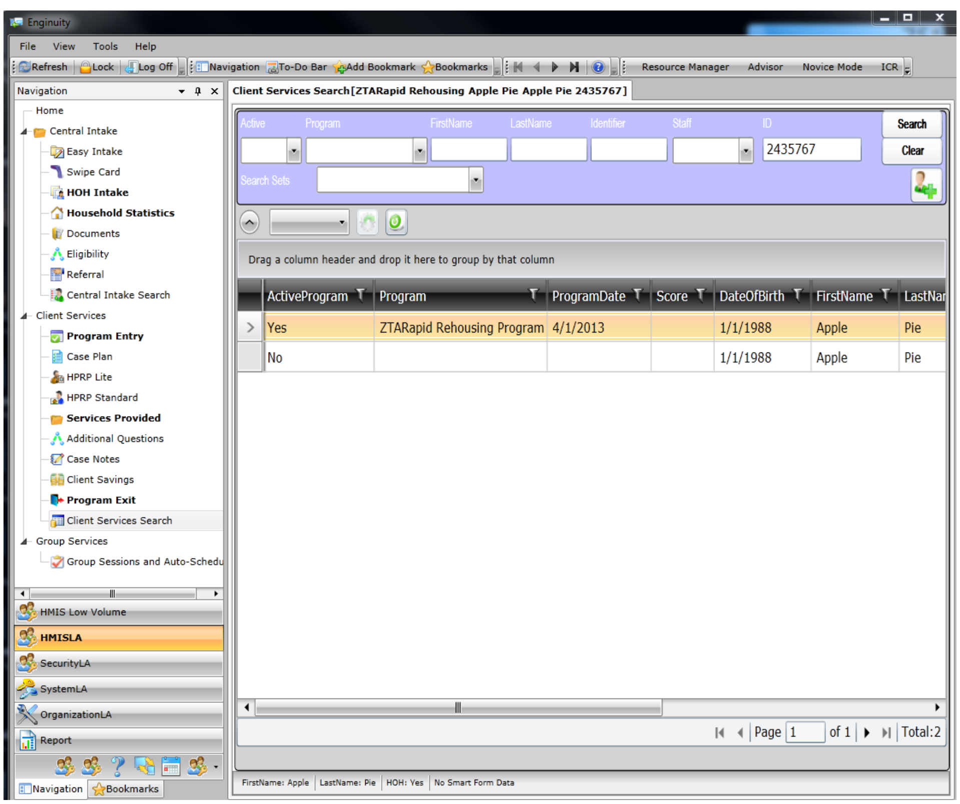


Additional Pages

Central Intake Search – you can search by any of the fields listed. Usually ID#, Identifier or Name



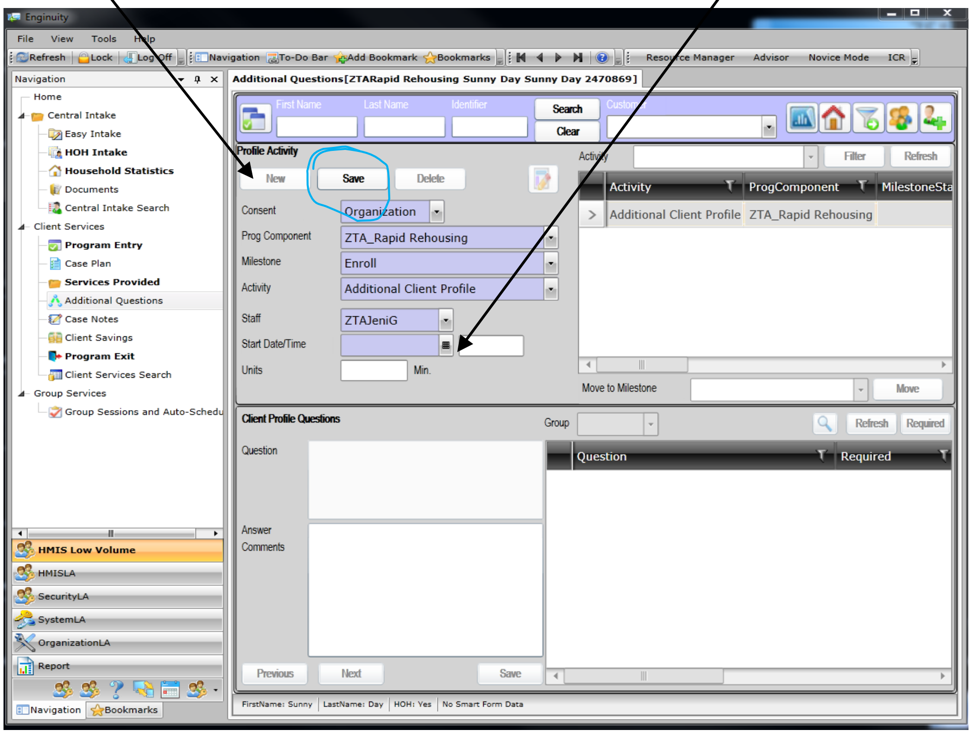
Client Services Search – you can search by any of the fields listed including Program and Active = Yes/No



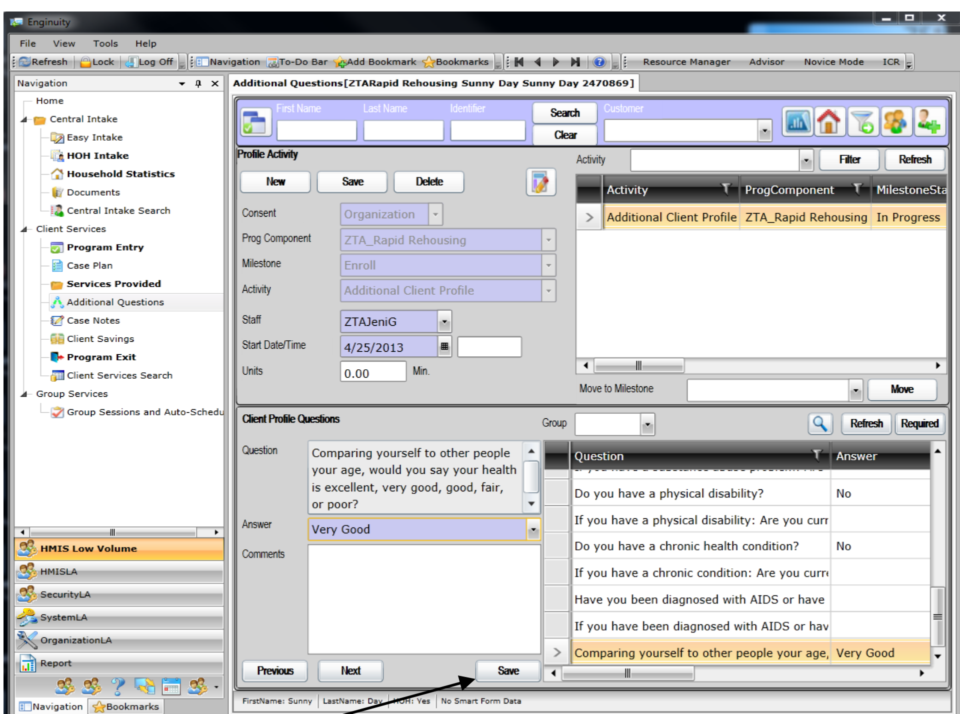
Additional Questions – To be filled out for all clients every 12 months of participation in a program

- **IYHP** clients have Additional Questions at Entry, every12 months, Exit and are available for Follow Up (generally 6 months)
- **WFF** clients have Additioanl Questions at Entry and Exit

1) Click on **New** 2) Enter Date 3) **Save**



4) Answer all additional questions - A summary of Questions with answers will appear in the box next to questions.



5) **Save**

Case Notes – not the same as the notes on the Household Statistics page

1) Click on **New**

2) Set Consent – can be set to private so only the person entering note sees it

3) Component - Click the dropdown box to select which open program the note is concerning

4) Activity - Click on the dropdown box to select activity associated with note (i.e. Case Notes).
   a. Staff (Case Mgr) and Date with how much time spent on the activity can be noted

5) Add subject and body of note

6) **Save**

7) Delete – you can delete a note by highlighting the note in the grid and clicking Delete